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ABSTRACT

This document contains specific recommendations for conducting bond campaigns. It outlines the three major considerations of any bond campaign: (1) committee organization and appointment; (2) time lines; and (3) getting out the vote. The publication focuses on the need for total community involvement and outlines some of the components for achieving this, such as a strong public-relations program, a unified school board, focus groups and opinion surveys, careful explanations of the issues, and the support of school principals, elected officials, business leaders, and the media. Campaign organization is also discussed at length, and suggestions are offered on the various committees and individuals that are needed, including a steering committee, a media coordinator, community leaders, a schools committee, a youth committee, a speakers bureau, a finance committee, and a "get out the vote" committee. A campaign timeline is presented that details what to do 3 three months to 1 week before the election. Suggestions on what to do the night prior to the vote and the day of the vote are also covered. A final section outlines important campaign questions, such as how the campaign will be promoted and what will be done to address the concerns of the opposition. (RJM)

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EA

total community involvement

campaign organization

steering committee

media coordinator

community leaders

schools committee

Planning Successful Bond Campaigns

youth committee

speaker's bureau

finance committee

"get out the vote"

campaign time lines

campaign questions

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301 N. Wilmington Street
Raleigh, NC 27601-2825

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Planning Successful Bond Campaigns

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Foreword

Dear Colleague,

The issue of voting bonds for school improvement is vital to most school systems. It is a process that requires total community involvement. Children require sound school buildings, just as they need a strong instructional program.

This document, developed by our School Planning section, contains specific suggestions and recommendations about conducting bond campaigns. From it you can obtain the necessary details about organizing a successful bond campaign. Three major considerations of any bond campaign
are identified:

- Committee organization and appointment
- Time lines
- Getting out the vote

You will find this publication most helpful after you have identified your needs and have established that a bond campaign is a necessary solution to the problem. Obviously, the public needs to be informed as to your needs and expected costs.

Please be aware that the staff of the Department of Public Instruction is always available to help you.

Sincerely,

Michael E. Ward

Dr. Michael E. Ward
State Superintendent

CONTACT:

Dr. Ben Matthews
Director
Division of School Support
(919) 715-2062

Gerald H. Knott, AIA
Section Chief
School Planning
(919) 715-1977

Dr. David Edwards
Consultant
School Planning
(919) 715-1967

Total Community Involvement

Referenda (tax levies) have a much better chance of passing if the school district has a strong public relations program in place. School districts that involve the community in activities and decision making already have a support group to mobilize.

A school board which is unified on the bond issue is not just important -- it is an absolute must! Board unity is one of the most critical factors determining whether a referendum can pass. Board members should possess the best information available on the district's needs. If the entire board cannot support the tax issue, then the district finds it very difficult to gain community support.

A referendum reflects a "values" vote. A person's values are not going to change during a two-month campaign. Changing an entrenched "no" voter's mind becomes very difficult, if not impossible. Identify supporters and get them to the polls.

Side issues can kill you! Often, voters don't really object to the tax increase, but are upset or frustrated by a side issue. These side issues can include a school site, the credibility of the board/superintendent, rezoning, consolidation, grade restructuring and demographic issues. A side issue may be an event just unfolding or an historic community split.

Every campaign is different. Communication techniques that work effectively in one district might not work in another. The side issues differ vastly, even in neighboring school districts.

A community-based steering committee should oversee the actual referendum campaign. The administration and board certainly may work in the campaign, but the community must play the major role. Select the chair and members of the steering committee carefully, choosing people who are respected and have credibility in the community. Give consideration and representation to all demographic groups.

Voters support issues they understand. A vote dealing with a tax issue sounds dull. Give adequate time and discussion to explaining the issue and gaining community support. Create a feeling of ownership for the building plan, both internally and externally, prior to setting the date of the election.

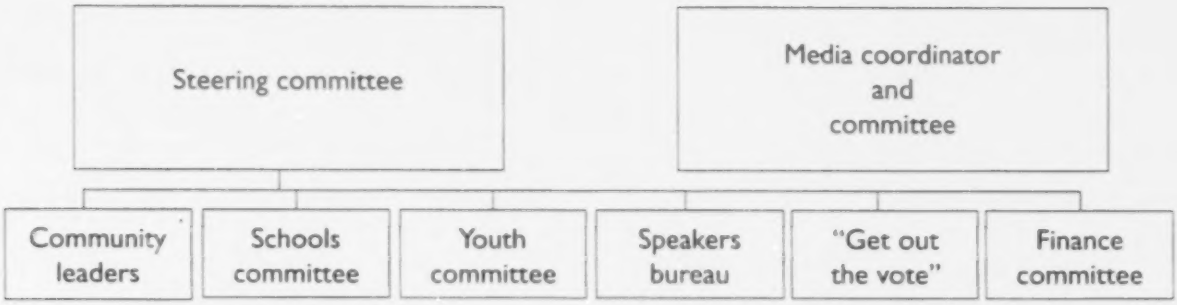
Get as much community involvement as you can in the initial stages of the development of the plan. Many districts establish community task forces to study building needs, review existing reports and make recommendations to the board concerning the building program. Often, these people then become powerful voices for the referendum.

Focus groups and public opinion surveys can help districts plan their public information programs. It's important to know how the community feels about the facility plan prior to the vote. These processes can often identify side issues and misperceptions which may affect your vote unless they are addressed in your written materials and community presentations.

- Write promotional materials simply, leaving out educational jargon. Materials need to deal with what the building program means instructionally for children, not solely on the square footage of buildings and site requirements. Voters support issues they understand and about which they feel emotional involvement.
- Discuss tax increases in terms of "dollars and cents." Many people understand the increase when explained in additional tax dollars on a $50,000/$100,000 home, farm property and the like.
- Support from the school "family" is vital when organizing a campaign. All school employees need to understand the rationale for the vote. Ideally, they have taken part in the development of the actual plan and feel ownership. Often voters go to district employees -- teachers and support staff -- to ask their opinions if they are undecided on how to vote.
- School principals play important roles in the development of your campaign. Since a principal serves as a key leader in most communities, his/her support and enthusiasm towards the vote affects how parents, students, faculties and the residents in their communities feel towards the building program.
- Districts also need support for the vote from elected officials. Because elected officials have their own supporters who historically assist them in their elections, they can influence this network in a positive or negative way towards the district's campaign. Meet with them to explain the district's needs early in the development of the plan.
- Don't overlook the media in your community. Again, work closely with all representatives to describe the district's needs and gain objectivity, if not support, for the campaign.
- Other needed support comes from local business leaders, chamber of commerce officials and chief executive officers of local industries. This group knows that a good, sound education system helps bring economic development to a community and they understand what a return on an investment means.
- After the campaign is over, file away for safe keeping all your research information, names of local support and organizational plans.
- Referendum campaigns may become even more frequent in the future.
- A number of North Carolina school districts are going back to the voters in second, and even third, referendums to request additional monies for school construction and equipment.

A school board which is unified on the bond issue is not just important -- it is an absolute must. Board unity is one of the most critical factors determining whether a referendum can pass.

Campaign Organization



Steering Committee

All sub-committee chairs automatically hold membership on the steering committee. The make-up of the committee should include at least one individual representing the following publics: school board, administrators, teachers, advisory councils, parents and students. Your committee chair can be counted as a representative of one of these groups.

Try to keep your steering committee as small as possible, since this group is your decision-making body. Too many members can prove unwieldy and make it hard to reach consensus.

The selection of your steering committee chair is one of the most important responsibilities you have in the campaign. A great deal of thought and input from others needs to go into this selection. The chair must be willing to donate a great deal of time to the campaign effort. The individual should be well organized and a stickler for details. The steering committee chair must keep tabs on all aspects of the referendum campaign.

The chair should be an individual who commands respect in your community and is well known for good judgment and thoughtful decisions.

Media Coordinator

The media coordinator is a key individual in the campaign organization. This person must be skilled in the field of communication. Among the responsibilities of this person and his/her committee are the following:

- The writing and developing of the overall advertising or promotional campaign. Input, of course, is requested from others.
- The writing and designing of brochures, fliers, news releases, slide presentations, bill-boards, advertisements, etc., carrying out the designated campaign theme.
- The media committee and the steering committee must work closely together. Both the media coordinator and the steering committee chair should be aware of all aspects of the campaign. Any problems need to be communicated to both as soon as they are known.

Community Leaders

This committee should consist of two individuals from each community in the district. Consideration needs to be given to racial balance. Among the responsibilities of the community leaders are the following:

- To assist in the scheduling of speaking engagements in their specific area(s).
- To accompany a speaker when a presentation is scheduled in their area.
- To work individually with local citizens.
- To assist in the "get out the vote" drive.

The overall chair for this group needs to be someone who is well respected and active in the community.

Schools Committee

The chair of this group should be a strong administrator. Each school will develop its individual referendum committee to pursue campaign activities. The principal of various schools should chair each school's committee. Any activities of a controversial nature must be cleared through the overall schools committee chair.

Responsibilities of this group include the following:

- The coordination and guidance of activities planned by the various schools, including student activities, open houses, etc.

Youth Committee

The purpose of this committee is to coordinate the district-wide effort of all secondary students. Membership on this committee should consist of the presidents of the senior classes and the editors of the high school newspapers.

The chair of this committee generally is a secondary principal. Among the responsibilities of this committee are the following:

- Members of the committee participate in press day (at least newspaper editors, if not the total group).
- Help media committee in the distribution of promotional materials.
- Work closely with the "get out the vote" drive in order to get all 18-year-olds registered to vote.
- Work with the media committee in taping radio spots.

The list could go on. This group will be highly enthusiastic; keep them busy.

Speakers Bureau

This is a very important committee. The responsibilities of the speakers bureau include the training and scheduling of all speakers making presentations to clubs and organizations. As the campaign progresses, a continuous evaluation needs to be made of the scheduled speakers. If a community has not scheduled the slide presentation, then contact needs to be made with community leaders to see that the presentation is scheduled.

All audiovisual equipment needed for the speakers bureau should be housed in proximity to the chair of this committee. The chair of the speakers bureau or a designated member should have the responsibility of checking all audiovisual equipment in and out. Every effort must be made to ensure that a complete working set of equipment goes with each speaker. Nothing is more frustrating than to go to a group to make a presentation and find that your equipment does not work properly.

The chair of the speakers bureau is responsible for notifying a principal and a community leader from the area where a presentation is to be held. One or preferably both of these individuals need to accompany the speaker to the engagement.

Finance Committee

The finance committee works with the steering committee in the development of fund-raising activities. All promotional costs for the campaign should be covered through donated funds. The finance committee needs ample time to brainstorm. Many good fund-raising ideas can be generated from this group.

"Get Out The Vote" Committee

The chair of this committee needs to be someone who is politically active and has campaign experience in getting voters to the polls. This is no position for a novice! Chairing this committee takes a great deal of time and effort. Someone needs to be selected who has the time to donate. All committee members need to be highly skilled in precinct organization.

Many functions fall under this group which mean the formation of several sub-committees. Literally hundreds of individuals can be utilized as volunteers under this committee. Remember, the more people you involve in a well-organized campaign, the more folks you have committed to the passage of your referendum.

Among the functions of this committee are:

- Voter registration: Recruitment of the 18-year-old vote, newcomers to the community and potential supporters not registered.
- Absentee ballots: Do not forget your college-age students.

- Telephone committee: Used frequently during the campaign. Depended on heavily during the last days of the effort. A system should be established so that your YES voters are identified and contacted the day before and the day of the vote.
- Door-to-door canvassing: in many instances this can be one of the deciding factors, as far as your vote is concerned. The major channel of communication is still word-of-mouth. Voters still listen to the opinions of their neighbors. The key is to identify your YES voters and get them to the polls.
- Direct mail: Each YES voter needs to get a reminder the day before the election to get out to vote.

Campaign Time Lines

Three Months Prior To Election:

- Media committee drafts and submits a campaign budget to the finance committee.
- Finance committee begins raising the funds necessary to defray the cost of the promotional items for the referendum.
- Media committee has close to completion all copy, art work, slides, etc. for the production of promotional items.
- Community leaders quietly begin contacting prominent leaders in the community, opinion makers, and local politicians, seeking their support. They also assist in scheduling of the slide presentation in their various communities. Schedule the slide presentation no earlier than five weeks before the vote, with maximum exposure the week prior to the vote.
- Explanation of the building program, its purpose, what it will mean to children, etc. is provided to each professional and support staff person. Ideally, these groups have already had an opportunity to be involved in the planning of the building program. Various meetings may be needed to accomplish this task. For the next three months, information concerning the building program is carried in the district newsletter. Follow-up meetings need to be held with these same groups as you draw closer to the election date. School district employees are crucial to your referendum. Make sure they are kept informed.
- Each school's referendum committee develops its plan to promote the referendum. The principal of each school is in charge of this effort. In the high schools, the youth and the school's committee work together.
- The "get out the vote" committee begins organizing at the precinct level. Computer registration tapes need to be ordered, the telephone survey is developed, phone numbers are plugged into the voter sheets and volunteers are recruited. These activities are accomplished quietly, without drawing attention to the campaign.
- Voter registration is underway.

Two Months Prior To Election:

- The steering committee approves all campaign promotional items. The items are in the process of being produced.
- Each school submits a plan for its referendum activities to the overall school committee for approval.

- Copies of the slide presentation or video tape are ready for showing and speakers receive appropriate training.
- Phone numbers continue to be plugged into voter registration lists. (This is a time-consuming effort.)
- The finance committee completes the fund-raising drive.

Five Weeks Prior To The Election:

- The slide presentation begins in the community. Remember to schedule maximum exposure during the last two weeks of the campaign.
- Press day is held for all local media representatives, high school newspaper editors, local college newspaper editors, etc.
- Specific assignments are made and training begins for persons involved in the "get out the vote" drive.
- The media plan is finalized and an accurate timetable established concerning the dissemination of appropriate promotional items (bumper stickers, campaign buttons, fliers, yard signs, etc.).
- Revise paid media schedule to reflect the funds that were raised.

Four Weeks Prior To The Election:

- Citizens on the media committee contact local businesses and ask if their changeable-copy signs can be used the week prior to the election. The signs carry the referendum slogan, etc.
- Advertisers in local papers are contacted and asked if a copy of the referendum logo can be dropped into their already existing advertising copy the week prior to the election. Permission must be received from the newspaper prior to contacting advertisers. Signed permission slips are obtained from each advertiser before inserting logo.
- If radio spots are used, they should be written and taped. The decision to use radio spots should be weighed carefully. Spots do not begin playing until three or four days prior to the campaign, unless you are facing strong opposition.
- Newspaper ads are designed and the placement schedule is discussed with appropriate papers.

Three Weeks Prior To The Election:

- Breakfast for opinion leaders is held at all schools in the district (slide presentation is shown).
- A meeting is scheduled with the ministerial association.
- Open houses for the public begin in all schools. Designate specific nights and show slide presentation.
- Careful evaluation of the locations for the showing of the presentation is made. Contacts are made in those areas targeted as YES precincts not receiving saturation.

Two Weeks Prior To The Election:

- Begin your telephone survey. The survey must be completed during this week. Make sure your callers have been thoroughly trained.
- Direct mailing is sent to all ministers in the county, with a bulletin insert attached to the letter. Ministers are requested to print the bulletin insert in their programs (insert is actually an announcement).
- Sample ballots are distributed to appropriate groups.
- The results from your telephone survey (your YES vote) are being typed, precinct by precinct.

One Week Before The Election:

- Campaign buttons can be worn.
- Billboards can be posted. Weigh carefully whether you want to post boards.
- Changeable-copy signs are up.
- Posters in stores are on display.
- Yard signs are up.
- Ads in newspapers begin appearing. Build to maximum exposure on election day.
- Undecided voters get a special mailing signed by an opinion leader in the community.
- Telephone survey is complete. The YES vote has been determined in each precinct.
- Radio spots can begin. Frequency will build and peak on day of the election.
- Telephone banks are established.
- Transportation system is organized.
- Precinct workers are trained.

Night Prior To The Vote:

- Telephone calls are made to all identified YES voters urging them to vote.
- Transportation services, etc. are offered and times for pick-up are scheduled.

Day Of The Vote:

- "Get out the vote" drive is in full swing.
- Reminder calls are made to YES voters who have not voted.

Campaign Questions That Need Answers

General Overview:

- Who supported you the last time you went to the polls?
  Why?
  Where are these people now?
- How do they feel about the current issue?
- Do you anticipate any problems which might affect the vote, even though they are not related to the issue?
- How can you eliminate or minimize these problems?
- How can you capitalize on the good things the school district is doing?

Opposition:

- Have you had organized opposition in the past?
- Where can you expect opposition in this campaign?
- What will these people be opposed to?
- How will you counter opposition, if it appears?

Media/Promotional items:

Promotional Items

- Has a budget been developed?
- What promotional items will be used?
- Will the items target the YES vote?
- Who is in charge of developing the items?
- How will the items be distributed?
- Have you discussed the positive or negative impact of these items?

Media

- Will you hold a press day?
  When?
  Who is in charge?
- Has an agenda been planned?
- Are you planning to use news releases in the campaign?
  When?
  After every endorsement?
  Who will write them?
- Do you plan an organized "letter to the editor" campaign?

Ballots

- What will the ballot say?
- Are you using sample ballots?
- How will the ballots be distributed?
- Who is responsible for the printing?
- How many sample ballots will you need?

Fund-raising efforts:

- Has a budget been presented to the fund-raising committee?
  How much?
  Is it realistic?
- Is the fund-raising effort underway?
  Who is involved?
- What groups or individuals have been contacted?
- Do you plan any special fund-raising activities?
  When?
  Where?
  Who is in charge?
  How much money do you plan to raise?

Employee relations:

- How will you get the campaign message to the staff?
- Who will encourage staff members to register to vote?
- Who will be responsible for seeing that staff members vote?

Speakers bureau:

- Do you plan on using a slide presentation or video as part of your speakers bureau?
  How many copies will you need?
- Who is in charge of scheduling the speakers?
- Have the speakers been recruited?
  How many?
- Will the speakers be trained?
  When?
  How?
  Who will train them?
- Will there be a speaker's manual?
- Has a typical program agenda been prepared?

Opinion leaders:

- Will you invite all elected officials on a tour of the schools?
  When?
  How?
  Who will be in charge?
- Have you made personal contact with opinion leaders in the community seeking their support?
  Who?
  Was their response favorable or unfavorable?

"Get out the vote":

- Do you plan an organized voter registration drive?
- Do you plan to aggressively recruit absentee voters?
- Are you organizing your "get out the vote" drive at the precinct level?
  How?
  When?
  Who is in charge?
- Do you plan on targeting key demographic groups through direct mailings?
  Who?
  When?
- Have the mailings been prepared?
  Who is in charge?

- Do you plan to use a telephone survey and/or conduct a door-to-door canvass?
  - What precincts?
  - Will you train workers?
  - What materials will you need?
  - Who is in charge?
- Will you compile a YES list for each precinct?
  - When?
  - How?
  - Who is in charge?
- Are you calling all YES voters the night before the campaign?
  - How?
  - How many people will you need?
  - Will you offer transportation?
  - Who is in charge?

Election day:

- Are any events likely to occur on this date which will affect voters?
- Are poll watchers in place?
- Have they been trained?
  - When?
  - By whom?
- Have runners been assigned to each poll to pick up the YES lists?
- Are telephone banks in place to make reminder calls?

Conclusion:

- Who is in charge of the victory party?
- Have thank-you notes been written?
- Have all promotional materials been taken down?
- Review your vote carefully, in case you have to go through the process again.

The Department of Public Instruction acknowledges the work of Jeannie M. Henry, South Carolina School Boards Association, in preparing much of these materials.